

**SECTION 67: OUTREACH, INTAKE, AND INFORMATION &
ASSISTANCE/REFERRAL**

67.01 PURPOSES

Each Area Agency on Aging (AAA) must provide outreach, intake, and information & assistance/referral services to maintain vital links between consumers and needed services.

- (A) Outreach.** The purpose of outreach is to seek out and identify older people to inform them of and encourage them to use existing services and benefits.
- (B) Intake.** The purpose of intake is to gather information about the consumer in order to determine needs and provide appropriate information and resources.
- (C) Information & Assistance/Referral.** The purpose of information & assistance/referral is to provide individuals with information on services available; link consumers to the services and opportunities that are available; and to the maximum extent practicable, provide follow-up.

67.02 ELIGIBILITY

Consumers eligible for services under this section are individuals age 60 and over, with particular emphasis on those with greatest economic and social need.

67.03 REQUIREMENTS OF AAA

- (A) Service Requirements.** In providing outreach, intake and information & assistance/referral services AAA must:
 - (1)** Seek out and identify older persons who are unaware of services available to them.
 - (2)** Receive requests for assistance and act upon them.
 - (3)** Gather information from the consumer and determine their needs.
 - (4)** Provide information to older consumers and their families about available services.
 - (5)** When necessary, assist in the completion of applications for needed services.
 - (6)** When appropriate, refer consumers to other AAA staff or other agencies providing services.
 - (7)** Advocate to ensure clients' rights and access to benefits for which they are eligible.
 - (8)** Advertise and promote the availability of information & assistance/referral services through written materials, newspapers, radio, internet and other media. Advertisements must include the hours and locations where services are available and how to obtain them.
 - (9)** Establish procedures to assure that appropriate follow-up occurs.

- (10) Establish an intake process and policy which ensures that the consumer is served in a timely fashion but not later than two (2) business from time of intake.
- (11) Develop and maintain updated resource materials for use by staff and the public.
- (B) **Staff Requirements.** Outreach, Intake and Information & Assistance/Referral providers must:
 - (1) Have a director whose primary responsibility is directing outreach, intake, and information & assistance/referral programs. The director must be qualified through education and/or experience in health or social services to work with elderly and to provide program management including staff supervision and training.
 - (2) Have an information & assistance/referral specialist. The information & assistance/referral specialist must be qualified through education and/or experience to communicate effectively with older people on the telephone and in person, maintain current knowledge of services and programs and to assist older people in obtaining services.
 - (3) Provide outreach, intake, and information & assistance/referral staff, who are qualified by training or experience, throughout the Planning and Service Area during business hours to accept referrals, provide assistance, arrange and provide site or home visits, develop and implement a service plan to meet the needs of older people. Outreach, intake, and information & assistance/referral staff may be full or part time, volunteer or paid.
 - (4) Provide periodic training for outreach, intake and information & assistance/referral staff to ensure current knowledge of benefit programs, other programs and services available to older people, effective communication skills and advocacy skills.

67.04 CONSUMER RECORDS AND REPORTS

Consumer records and reports for outreach, intake, and information & assistance/referral. Each AAA must have a policy regarding consumer records and reports that addresses the following requirements:

- (A) For each inquiry from or action on behalf of consumers by staff, the AAA must maintain the information necessary to provide appropriate services and adequate follow-up when needed. Consumer records must contain documentation of the following:
 - (1) Date of initial request and dates service was provided;
 - (2) Town of residence and, if needed, consumer's name and mailing address;
 - (3) Mode of contact (telephone, walk-in, in-home, service site, postal mail, e-mail, fax);
 - (4) Problem expressed or service/information requested;

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- (5) Information and assistance provided by the AAA and, if appropriate, progress notes detailing the service plan.
- (B) The AAA will make reports, in such form and containing such information as the Bureau may require, and comply with such requirements as the Bureau may impose to assure the accuracy of these reports.

67.05 RIGHT OF APPEAL REGARDING OUTREACH, INTAKE AND INFORMATION & REFERRAL

- (A) Services to the consumer may be denied, reduced or terminated when:
 - (1) The consumer engages in sexual or other illegal harassment of an employee or volunteer of a provider; or
 - (2) The consumer's participation puts others, including service providers, in danger; or
 - (3) Funds are not available.
- (B) Denial, reduction or termination of services under Section 67 shall be done in accordance with Section 40 of this policy manual.